

Getting Started with PoliteMail for Outlook 365

Last Modified on 11/21/2023 11:02 am EST

Applies To: PoliteMail Desktop PoliteMail Online PoliteMail O365

Version: 4.94 4.97 5.0+

Note: This article assumes a familiarity with the various components of PoliteMail. For detailed information on Content items, Settings, Mailing Lists, and Reporting, please refer to the User Guide for either PoliteMail Online or PoliteMail for the Desktop.

The Politemail365 Add-On is designed to give users quick access to PoliteMail measurement tools without leaving Outlook365. Users can access any content that has been stored on the PoliteMail Server, as well as import new content such as templates and Smart Attachments. Please note that your [user role](#) and [Group assignments](#) will carry over into PoliteMail365.

Before you can start sending and measuring email messages, you must first download the PoliteMail 365 add-in and connect to the PoliteMail Server.

Activating and Connecting

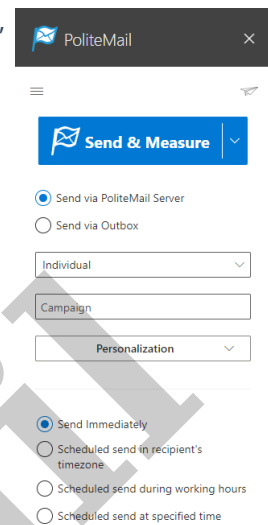
1. Download the software. This is usually from a manifest, but may be from the store, depending on your organization's implementation.
2. Login to Microsoft365 and open Outlook.
3. Click New Message. You will see the PoliteMail icon in the Outlook ribbon.
4. You will be asked to login to the PoliteMail Server.
5. The PoliteMail panel will open on the left-hand side.

Viewing the PoliteMail Pane



From the Compose window of Outlook365, you will see the PoliteMail button in the toolbar. Clicking on this button will open the PoliteMail panel.

1. Click the three lines (the hamburger menu) to view and insert PoliteMail content, such as Templates, Tags, Paragraphs, Images, Links, Smart Attachments, and more. You can also find some settings here, as well as the ability to switch to PoliteMail Online.
2. The airplane icon will send your message via PoliteMail right away. Clicking the large blue 'Send & Measure' does the same thing.
3. Click the drop-down to do [Preflight test send](#), disable [Open Measurement](#), [O365 or iOS measurement](#), or to get a Recipient Count.
4. It's a best practice to have 'Send via PoliteMail Server' selected; this option is much faster than sending via Outlook.
5. Select your type of [measurement](#) from the list.
6. Click the '[Campaign](#)' field to associate your email with a Campaign that you select.
7. '[Personalization](#)' lets you insert various standard and custom fields to make each email specific to the recipient.
8. Select from the options to send the email right away or schedule it for later.



*Note: You must click the Send or airplane button in the PoliteMail Pane to measure the email in PoliteMail; the standard 'Send' button in the Outlook window will **not** measure the email.*

About PoliteMail 365 Capabilities

PoliteMail365's main function is to add PoliteMail features and tools to emails being composed. There are many more PoliteMail capabilities, however, that can only be taken advantage of in the desktop version of PoliteMail, or in PoliteMail online.

- Reporting metrics is available only on the desktop version or PoliteMail online.
- While you can create some content such as Templates, Paragraphs or Links, it is recommended to do those functions in the desktop or online version of PoliteMail for ease of use.
- Adding or creating PoliteMail Lists or Tag Groups must be done in either the desktop or online version.